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# EXPLORING THE SENIOR TOURISM MARKET FOR VISTA ALEGRE ÍLHAVO COMPLEX COMPETITIVENESS

Tiago Miguel dos Santos Boto | 2603

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## Abstract
Over the decades, tourism experienced continued growth, totaling 12,6bn€ in revenues, accounting for 6.15% of GDP and 9.2% of employment in Portugal in 2016 (Eco, 2017), becoming one of the fastest growing and resilient economic sectors worldwide, namely in Portugal, helping the recovery of a fragile economy. Hospitality industry follows this trend and hotels seek for new markets to develop their potential. Senior tourism is one of these markets.
The project aims to understand the importance of senior tourism for Vista Alegre Ílhavo Complex competitiveness within the geographical context of Aveiro region as a tourist destination. This work is based on a case study, collecting primary data through the application of a survey to visitors at Aveiro city center and Vista Alegre Ílhavo Complex. The analysis seeks to identify the profile of senior tourists in Aveiro region in order to draw some recommendations to Vista Alegre Ílhavo Complex management board regarding products, services and marketing strategies for the senior segment.
**Keywords:** senior tourism, luxury and quality tourism, Vista Alegre Ílhavo Complex, Aveiro (Portugal).

## 1. Introduction

Over the last half of the 20th century, tourism has established itself as an expanding economic activity with a particularly high potential for sustainability and diversification, becoming one of the fastest-growing economic sectors around the globe characterized by a mighty territorial dimension. Tourism international arrivals rose from 21m€ in 1950 to 1,235m€ in 2016. Revenues from tourism totaled 475bn€ in 2000 and 1,3tri€ in 2016 (UNWTO, 2016).

The United Nations World Tourism Organization (UNWTO, 2016) defines the tourism sector as “the cluster of production units in different industries that provide consumption goods and services demanded by visitors. Such industries are called tourism industries because visitor acquisition represents such a significant share of their supply that, in the absence of visitors, their production of these would cease to exist in meaningful quantity” (*Appendix A*). The tourism sector encompasses several components that condition the motivations of travel and the attractiveness of destinations, ranging from services offered and quality delivery to location or business and local partnerships.

Globally, international tourism revenue worldwide hitchhiked from 2bn€ in 1950 to 106bn€ in 1980 and from 495bn€ in 2000 to 1280bn€ in 2015 (WTO, 2016). Accounting for 7% of the world's exports in goods and services in 2016, tourism has grown faster than world trade over the last 4 years (near 1% yearly since 2011 and expected to grow 2% in 2017) (WTO, 2016). In Portugal, the impact of tourism on the economy is striking. According to the World Travel & Tourism Council (WTTC, 2017), the direct contribution of the tourism sector to GDP was 11.9bn€ (6.4% of total GDP) in 2016 and is forecasted to rise by 2.8% in 2017, and to rise by 2.2% pa, from 2017-2027, to 15.1bn€ (7.3% of total GDP) in 2027; estimations about the total contribution of tourism sector refer 30.8bn€, 16.6% of GDP in 2016, and is forecast to rise by 2.6% in 2017, and to rise by 1.9% pa to 38.2bn€, 18.5% of GDP in 2027. Regarding employment, in Portugal, in 2016, tourism directly supported 371,500 jobs (8.1% of total employment) and it is expected to rise by 3.4% in 2017 and rise by 1.4% to 441,000 jobs (9.6% of total employment) in 2027 (WTTC, 2017).

From the foregoing, the aim of this project is to understand and explore the importance and potentialities of the senior tourism as a tourism segment for VAIC competitiveness within the geographical context of Aveiro region as a tourist destination. To accomplish this objective, the dissertation is thus divided into two sections. In the first part, the main literature in senior tourism and luxury, experience and high-quality tourism will be reviewed. The second part is based on a case study methodology: Montebelo Visabeira Turismo Group and the Vista Alegre brand in the tourism sector to study the VAIC. Findings from the quantitative analysis will be presented as guiding foundation to answer the research question: How can Vista Alegre increase attractiveness for the senior and high-quality tourism segment? Finally, the main conclusions of this work will be drawn as well as suggestions and/or recommendations to address concrete courses of action for the hotel board. These are meant to increase the attractiveness of this segment and to capture the growth potential of both consumption expenditures and visitors in senior segment.

Understandably, such recommendations may be not only included in the scope of Vista Alegre touristic site but also other touristic operator or hoteliers in the region. Finally, all the information presented in this work has been provided and discussed with Visabeira Group that owns the VAIC and the surveys were collected to obtain information that may be useful for the decision-making process of both the tourism business of Visabeira Group and Vista Alegre, in particular.

# 2. LITERATURE REVIEW

## 2.1 SENIOR TOURISM

In this dynamic context, one of the main features of today's world population is the increase, in absolute and relative numbers, of older people. People aging 65 years or more are expected to represent 60% of worldwide population, especially in high-income countries for the 2010 and 2040 period (Eurostat, 2011). Such demographic change is forecasted to remain, with steady growth until 2050, when senior people will account for 2 billion people worldwide and 1 out of 5 people will be over 60 years old and 1 out of 6 will be over that age (Boksberger & Laesser, 2009). These growing numbers and the growing travel lust of senior people create a tourism market that neither the mainstream travel industry nor government authorities can ignore. Cavaco (2009) outlines that ageing is a powerful and unavoidable trend as the growing numbers of seniors will increase their influence on tourism activities in term of products, seasonality, etc. Health issues and physical and psychological dynamics that were, in the past, an obstacle to the creation of tourism offer are constraints that tend to appear more and at older ages (Bonn *et al*. 2009). Senior tourists due to their improved of quality of life, longer life expectancy or increased income are a potential age tourism segment characterized by lengthiest stays, higher expenditures and lower seasonality patterns of travel (Bonn *et al*., 2009; Bagus & Utama, 2012). The increased commercial, political and academic interest in senior travelers has stimulated a wide range of studies in recent years. In Portugal, in 2016, 21,1% of the Portuguese population is older than 65 years and is expected to rise from 2.1 to 2.8 million people between 2016 and 2080 (central scenario) (INE, 2017). Cavaco (2009) points out that warm weather, diversity of landscape and cultural and historical heritage, accessibility and gastronomy represent an opportunity for senior tourism in Portugal.

Among the demographic changes over the last thirty years, the aging of the world population, especially in the developed countries, stands out. According to United Nations Department of Economic and Social Affairs (2015), life expectancy will increase 4% in developed countries, with seniors accounting for 33,2% of total population (298,8 million) and expected to rise nearly 41% to 421 million in 2050[1]. This expansion of the elderly population together with better health conditions has been generating a significant increase in tourists with willingness and ability to travel (European Commission, 2013a). Portugal follows this pattern either in terms of inbound and outbound tourism. New developments on medicine and technological innovation as well social dynamics are other determining factors that shape the increasing time spent on leisure and travel by the senior segment, in correlation with the absence of professional and family constraints, the greater independence between generation and the decreasing family duties at home combined with financial freedom by the broadening of retirement pension as well as new sources of income. What is more, the senior segment is not homogeneous, not only in terms of age stages – young elders (between 55 and 65) and the "very elders" (over 75 or 80 years old) – but also in terms of income, as it consists of people of low, average or high income (Cavaco, 2009). Nevertheless, the mere differentiation of seniors solely based on the age factor is utter reductive and simplistic, so that other factors

[1] UN considers high-income countries, those with $12,736 GNI/per capita or more

emerge and become relevant, particularly when studying this population universe in the lens of its tourism interests.

There is wide dispute among scholars about the concept of senior segment, explicitly, in what regards to the age threshold in which individuals are considered as senior tourists (Turismo de Portugal, 2015). Some scholars consider seniors people over 50 years, others above 55 years (baby boomers), and others over 60 or between 65 and 74 years old. Treguer (2002) further densifies this conceptualization by introducing three dimensions on age: biological, psychological and social. Biological age refers to the natural course of individuals over the years, from childhood to old age; psychological age derives from individual experience, "the feeling of age" and social age that related to life cycles and stages and comprises both private and familiar age and public and professional life that encompasses education, professional occupation and statute in the society around. In fact, there are several designations and conceptualizations of the senior market. Marketing approaches identify several segments under different designations: 50+; 55+; 60+; Oldies; Goldies or Gold market; Selpies (Second life people); Woopies (Well of older people); Yollies (Young old leisured people); Wollies (Well income old leisure people); Grampies (Growing retired active moneyed people in an excellent state); Mature consumers; Grey wave; Grey Market; Busy Fit oldies; Master consumer; etc (Steina, 2014). The concept of "Baby boomers" is widely used to identify the generation born after the WWII (Colby & Ortman, 2014), the age of prosperity and technological advances and faster growth to the years before and during the 2nd World War- between 1946 and 1964 (Gilon, 2004). Papalia *et al*. (2002) refer as "Late adulthood", people over 65 years old. (Batra, 2009) consider seniors as people over 50 years old. Batra (2009) and Callan & Bowman (2000) introduce the concept of grey segment as the specific market niche that encompasses older visitors. Harssel e Theobald, (1995) define senior traveler as a sophisticated user and knowledgeable of tourism services and products. Others emphasize that the concept of senior in itself is linked with the retirement age: in Portugal, 66 years old; in France, 60 for men and 52 for women; and in the United Kingdom, 65 for men and 64 for women (Sidor, 2015). Several studies suggest a wide variance among states and even gender (Heaven *et al*., 2013; Munnel, 2015). In fact, because senior travelers are difficult to define and there is also little agreement concerning the definition of senior tourism. The statistical definition of the UNWTO (2016) and the Eurostat (2016) includes all travel by senior people aged above 65 years, although other organizations and authors use different cut-off points (Table 1).

Despite these conceptualization problems, the importance of senior tourism has been stimulating a growing research interest. Seniors are usually free from labor contracts, so they are able travel during several periods of the year, taking advantage, for instance, of off-season promotions, or pursuing warmer seasons for vacations. Senior tourism is an attractive segment because it is less sensible to seasonality and widely attractive to local economies (Scott *et al*., 2009; Ávila, Vincent & De Los Santos, 1990; Zimmer *et al*., 1995). In an Algarve study, Ferreira (2004) differentiated four senior tourism sub-segments: new senior tourism composed by younger seniors, well-educated and active, where destination diversification is relevant; typical senior stereotype, usually older, low-educated, less autonomous and more price-sensitive and loyal to specific destinations; wealth senior tourist, recently retired with higher time availability and purchasing power to travel several times a year and young summer senior, seniors between 55-64 that travel during summer with multi-generational aggregates which are still active and low price sensitive. Dahab & Mannebach (2014) stress the importance of social tourism and senior university in Portugal.

In this project, we adopt the definition of senior tourism market as those visitors over 55 years old, as established by several authors (Table 1).

**Table 1.** Reference senior age for several authors in tourism sector

| Author | Considered age | Author | Considered age |
|---|---|---|---|
| Bone (1981) | 50+ | Hsu (2001) | 55+ |
| Ander & Langmeyer (1982) | 50+ | Bai *et al*. (2001) | 55+ |
| Blazey (1987) | 50+ | Krause (2004) | 55+ |
| Shoemaker (1989) | 50+ | Lopes Rosa (2012) | 55+ |
| Bone (1991) | 50+ | Dahab & Mannebach (2014) | 55+ |
| Gollub & Javitz (1989) | 55+ | Browne (1984) | 65+ |
| Caballero (1996) | 55+ | Lumpkin *et al*. (1985) | 65+ |
| Farranda & Schimdt (1999) | 55+ | Day *et al* (1987;1988) | 65+ |
| Callan and Bowman (2000) | 55+ | UNWTO (2016) | 65+ |
| Fall & Knutson (2001) | 55+ | Eurostat (2016) | 65+ |

**Source:** Author, based on Neves (2009)

### SENIOR TOURISM: MOTIVATIONS

One of the underlying concepts of tourism is motivation. Motivation, a widely-studied concept derived from psychology assesses "why people think and behave they do (Graham & Weiner, 1996); "the inner state or certain needs and wants of a person, which forces them to act or behave in a certain way and thus sustaining human behavior and energy" (Decrop, 2004; George, 2006). Understanding that is, therefore, crucial to address such aspects that steers travel and tourism fluxes. Cooper & Hall (2009) assert that tourism consists in a myriad of influences and factors (availability, seasonality and experience seeking) that define its relative distribution – a co-created experience of people travelling voluntarily from one place to another and that travel motivations represent an integral part of tourism behavior as both the service and touristic experience are interdependent. George (2004) and March & Woodside (2005) claim that motivations are the most important psychological factor that influences touristic behavior. The intention and consumption behavior is indefinite, as it varies a lot given the degree of differentiation and the abundancy of possible choices to create a pattern of consumption. For this reason, motivation is the factor that influences the most of direction and borders of tourism. Thus, possessing the adequate knowledge and understanding the touristic behavior, strategies and policies are key, as the thoughts, behavior and decision making are set before, during and after the trip. Briefly, decision process in tourism is highly dependent of those factors with regard to tourism activities.

As for tourism, several studies indicate that seniors uphold higher levels of motivation to travel either for educational motives, for social enrichment, for escaping and relaxing or for visiting new places when travelling (Chen & Gassner, 2012; Horneman *et al*., 2002; Huang & Tsai, 2003; Le Serre *et al*., 2013). In a study of the touristic behavior of elderly Germans, aged 60 years and over, Romsa & Blenman (1989) concluded that the strongest motivations for getting seniors to travel were to visit friends and relatives, health, and rest and relaxation. In another study, Acevedo (2003) concluded that the most important reasons for senior tourists to travel are to try new things or to visit new places, to rest and relax, to escape the routine of everyday life, to meet people and to socialize and visit museums and historical places. Moreover, Shoemaker (1989) pioneered the issues of characterizing the senior market in its heterogenic approach; the aim of this study was to discover the benefits that seniors had from tourism, targeting senior tourists in three groups: family travelers, who travel to spend time with their family; active resters seeking spiritual and intellectual enrichment, meeting other people and socializing, resting and relaxing, escaping from the routine, doing physical activities and visiting historical places and older set, this one that will explored in further detailed. Their motivations were not revealed by the study, however they showed an interest in visiting historical places, telling friends of what they visited and preferring to return to the same destination instead of trying a new one. Other studies find that older tourists prefer package tours, especially because of health constraints, compatible companions, value for money and reduced discomfort in encountering unacquainted situations while traveling to strange places, etc. (Patterson, 1996; Lee and Tideswell, 2005; Lee *et al*., 2012). Bonn *et al*. (2009) found that service friendliness, ease of getting around, climate and perceived value were the most significant predictors of package tourist satisfaction, in a study on the US tourists who visited China. Takeda and Card (2002) explored the difficulties for disabled tourists in the group.

### 2.2 LUXURY, EXPERIENCES AND QUALITY TOURISM

Luxury and experiences in tourism became, in recent years, an increasingly popular segment. Scott *et al* (2009) mention that western societies devote a "considerable portion of their resources to the pursuit of the good life" – one of contentment, pleasure and happiness, which are at the core of the notion of the fourth economic stage, the experience economy. Holbrook and Hirschman (1982) conceptualize the notion of luxury experience as the consumers seeking for a "steady flow of fantasies, feelings, and fun". Therefore, Pine and Gilmore (1999) point out that "economic values go in a natural progression – from commodities, to goods, to services and finally to experiences"; the authors state that we live in the experience economy. Shaw and Ivens (2005) research shows that 85% of senior business managers believe that differentiating exclusively on the traditional elements, such as price, product and quality, is no longer a sustainable competitive advantage and an increasing number of senior managers regard the customer experience "as the next competitive battleground". Prahalad and Ramaswamy (2004) state that experiences are co-created; the value in itself is incremental to goods, services through active participation that delivers experiences. In luxury hotel market, some features of luxury customers and providers, namely the search/deliver of personalization, authenticity and comfort in services (Araújo, 2012) stress this perspective.

Taking the importance of experience to luxury tourism, Schmitt (1999) offers a customer experience management framework with a five-step program to involve and analyze the customer's world. This author asserts that experience marketing can deliver sensory, emotional, cognitive, behavioral and relational value to customers, to which social and informational-based value can be added. In this particular, Mossberg (2007) claims that an experience is "an amalgam of several elements coming together and involving consumers emotionally, intellectually and spiritually". Regarding quality in tourism, UNWTO (2017) defines quality of a tourism destination as "the result of a process which implies the satisfaction of all tourism product and service needs, requirements and expectations of the consumer at an acceptable price, in conformity with mutually accepted contractual conditions such as safety, hygiene, accessibility, communication, infrastructure and public amenities and services. It also involves aspects of ethics, transparency, infrastructure and public amenities and services".

Since tourism is extremely labor intensive and a significant source of employment (ILO, 2010), quality delivery must start out on its human resources and on how the service is provided. In this context, Pearce (1982) identifies those variables that when delivering quality in services create a negative tourist perception of the service (e.g. service provides impoliteness or professional incompetence). Therefore, tourism as a service holds several unique characteristics, which distinguish them from physical goods and outline the nature of these services: product, intangibility, inseparability of production and consumption, consistency, perishability, ownership or benefits purchased; the authors also define service quality as the ability to perform a service dependably and accurately (Parsuraman *et al.*, 1988). Kandampulyy *et al.* (1996) argue that quality in tourism and hospitality industry relies heavily on the development of positive perceptions of people providing services to tourists and that a tourism product is a combination of different sub products, including facilities, people and the total touristic experience and satisfaction with these sub products. Sutton

(1967) reported that providing competency in providing services is an important element influencing positive tourist perceptions of service. Consequently, in a fast-growing experience economy, customers are seeking more variety and customization than they ever before (McColl-Kennedy *et al.*, 2015) As such, customers might also co-create their own experiences and thus become an essential part of tourism offerings (Poulsson and Kale, 2004) as co-producers (Walls *et al.*, 2011) and operant resources (Vargo and Lusch, 2006) beyond the planning and staging of the experience itself. Lehtinen and Lehtinen (1982) distinguish several concepts peculiar to providing services properly encompassing quality (physical aspects); corporate (organization's image or profile), interactive (interaction between contact personnel and the customer). The tourism product is, consequently, a combination of both tangible and intangible items that provide the tourist with total psychological experiences. Customer satisfaction is the key factor in the formation of a customer's wish to repeat purchase (Mittal & Kamakura, 2001). In services like tourism, customer satisfaction depends on the quality of services provided (Zeithaml *et al*. 1996). Therefore, the notion of quality is relevant when discussing a touristic cluster or destination.

Therefore, quality in tourism should be regarded as a dimension based on a systemic perspective that relies on market strategy and TQM (Total Quality Management) dimensions that influences the whole supply chain of both products and services of the Tourism Industry. The key link of that chain determines the hospitality that forms the base of the tourist product (Kosar & Kosar, 2012). Lastly, the nature of the tourism product implies the importance of cooperation between all the sectors in order to achieve and integrated tourism product and to accomplish the major goal, which is tourism satisfaction (Kandampulyy *et al.*, 1996).

## 3. Case study: Vista Alegre Ílhavo complex (VAIC)

## 3.1 VAIC: GEOGRAPHICAL COMPETITIVE ENVIRONMENT

In Portugal, "Visit to family or friends" was the main motivation to travel, generating around 8.9m trips (44.8%), followed by "Leisure, recreation or vacation" with 8.1m (42.2%) and "Professionals or business" placed as the third motive (1.7 million trips). In this particular, Centro region[2] was the main destination for domestic travel in 2015, gathering nearly 5.7m visitors, with an average stay of 3,2 nights (INE, 2016). In 2015, the 65 hotels located in Aveiro represented 15.7% of Centro region (NUTS II); from which 27.3% of these hotels were rated 4 and 5 stars, a number considerably below the 4 and 5 stars hotels national average (42%). Melia Hotel, Moliceiro Hotel, Hotel Aveiro Palace and Hotel Ílhavo represent the 4-star segment in Aveiro; Vista Alegre Montebelo Ílhavo Hotel is the only 5-stars-ranked hotel facility in the region (Appendix C).

Several initiatives have been taken to develop the tourism potentialities of Portuguese regions and Centro region and Aveiro, in particular, are no different. A combination of biophysical, historical and cultural heritage as well as a renowned local gastronomy characterizes a region that is impacted by a high degree of seasonality considering the prominence of sea and coastal resources mostly beaches and sea that attract most of its visitors (Albuquerque, 2013). Also, the region is particularly diverse and qualified both in terms of landscapes and sea and coastal resources which "combining the lagoon, seaport, salines, aquaculture, agriculture, sports tourism and nature protection" encompass a differentiating factor for a wetland region like Aveiro" (CCDR, 2011). Despite its diversified and comprehensive tourism potentialities, namely as one of the largest, most diverse and biologically significant Portuguese coastal

[2] Centro region (NUTS II) is a geographical and statistical unit that encompasses 100 municipalities, including Aveiro.

wetlands, tourism in Aveiro lacks exploration, being highly dependent on the touristic influxes of Aveiro city as the major pole (DGOTDU, 2007).

In this context, the cluster concept is adopted to designate the specific characteristics of tourism activity – conglomerate of providers, services offered, interlinked activities and public and private partnerships – whose product "is linked to both its local base and also to the joint action of an agglomerate of enterprises involved in the region's tourism product" (Cunha, 2005). According to Zacarelli (2004), a comprehensive touristic cluster shall include not only technology-related features as well as competitive, environmental and cultural sustainable, that fosters quality of life and local sinergies as a result of systemic relations. Montfort (2000) introduces tourism cluster as "a complex group of different elements, including services carried out by tourism companies or business (lodging, restoration, travel agencies, aquatic and theme parks, etc…); richness provided by tourist holiday experiences; multidimensional gathering of interrelated companies and industries; communication and transportation infrastructures; complementary activities (commercial allotment, holiday traditions, etc.); supporting services (formation and information, etc); and natural resources and institutional policies". Facing rising tourism figures, not all regions are effectively prepared to ripen the benefits of tourism activities. Tourism development requires cultural, physical-natural and social characteristics that define each region's identity, accessibility to infrastructure, supra-structure (accommodation, restaurants, transport, etc.) delivering a high quality service. In addition, it requires an upright tourism marketing strategy in order to disclose an appealing, distinctive and competitive image of its tourism product (Smith, 1988). Porter's strategy concept of agglomeration is defined as: "a geographical assembly concentrating inter-related enterprises, correlated institutions in a determined area linked to common and complementary elements. The geographical scope varies from a single town or state to the whole country or even a net of neighboring countries. Such agglomeration assumes diverse ways, depending on their deepness and sophistication, but most of them include enterprises of products and final services, specialized input suppliers, components, equipment and services, financial institutions, enterprises and correlated sectors. The agglomerations generally may also include companies up and down in the supply chain, producers of complementary products, suppliers of specialized infrastructure, governmental institutions and others, devoted to specialized training, education, information, research and technical support (such as universities, study centers and workers on vocational training), and standardization agencies. The governmental institutions with main influence over the agglomeration would be one of its members. Finally, many agglomerates include commercial and other private associations which support its members". (Porter, 1998). Aveiro region, where VAIC is located, encompasses several elements that Porter considers to compound a cluster. Firstly, it is an agglomeration of 11 municipalities (Appendix D), it includes research centers of both ISCIA, University of Aveiro (a leading research university in Portugal on the fields of tourism, nature sciences and engineering) and, finally, a vibrant touristic environment. For example, Aveiro recorded a 32% increase in overnight stays from the first semester of 2016 to the first semester of 2017 (Turismo do Centro, 2017). Moreover, recent partnerships between Turismo do Centro, Aveiro University, Aveiro municipality, AIDA (the regional business and commercial association) amongst others reflect the strong interdependent and cohesive environment shared by both public and private organizations. In addition, such well-developed network of public and private agents represents a major point of difference when comparing to neighboring regions.

Finally, based on the definition of cluster as an agglomeration of public and private organizations linked to the umbrella concept of quality, VAIC fits in the application of this organizational theoretical structure to Aveiro region. VAIC comprehends a five star-hotel (Table 2) and an industrial museum, characterized by a differentiating service, an appellative environment integrated in Ria de Aveiro ecosystem, delivering modern facilities harmonized with tradition (for instance, porcelain decorated walls, rooms and luxury furniture).

**Table 2.** SWOT analysis for the Montebelo Vista Alegre Ílhavo Hotel

| | Positive | Negative |
|---|---|---|
| Internal | **Strengths (S)**<br>- High brand awareness of Vista Alegre among seniors<br>- Strategic alliances and partnerships with local and international stakeholders (eg. El Parador, Ria Tours)<br>-Well developed and renewed touristic and road infrastructures | **Weaknesses (W)**<br>-Low brand awareness and knowledge of the tourism sector<br>-Recent entrant on the hotel industry (Market follower)<br>-Higher learning costs for entering late in the market |
| External | **Opportunities (O)**<br>- Travel and tourism growth in Aveiro region (average 20%/year from 2008 to 2016, 40% from 2015)<br>- Only 5 star and luxury hotel in Aveiro region (NUT III)[3]<br>- Higher degree of visibility of Aveiro as tourism destination for seniors as a stopping point between major touristic location (Porto and Lisbon) | **Threats (T)**<br>**-** Low dimension compared with greater Vila Gale and Pestana Collection Brand<br>- Increased hotel offering in the region which may led to a higher degree of market saturation<br>- Outlying location compared to Aveiro center |

**Source:** Author, based on data from Turismo do Centro (Appendixes C) and Deloitte (2017)

### THE VISTA ALEGRE BRAND

Vista Alegre brand is deeply linked with the imagery of a rooted portuguese culture presence in its core since inception. The Vista Alegre factory, the first main industrial unit producing porcelain in Portugal is a synonim of loyalty to Aveiro region and integration in the region's industrial tissue . Started out by José Pinto Basto, Vista Alegre became the foremost player of decorative and porcelain tableware market, conoted in a quality segment and placed in a position of superiority with respect to portuguese clients.

[3] Despite Mélia is ranked as 4 stars, it also competes on the luxury segment, though it is not a concept hotel like Montebelo Vista Alegre Ílhavo Hotel nor a touristic complex.

Being top of mind company in porcelain market among portuguese consumers, especially older segment and enjoying great brand awareness among several consumers in the European market, namely Spain and Germany, where the quality, high-end products associated with the "portugality" concept that roots deep on portuguese culture and traditions and explores the design as a mean to allure high end consumers. Countless collections have been created by prestigious international designers such as Carsten Gollnick, Karim Rashid and Christian Lacroix or contemporary Portuguese Joana Vasconcellos. The Ílhavo-based company produces porcelain tableware, decorative pieces, giftware, hotel ware, high quality glass and crystal, and stainless steel cutlery.

### THE VAIC

Integrated in the renovation project of the Vista Alegre palace, the Nossa Senhora da Penha de França chapel (a unique baroque monument of XVI century), the working-class neighborhood, the theater and the museum, Visabeira Turismo (Appendix B) aimed to develop the touristic potential of Vista Alegre supported by guided tours to show the historical art collection of the brand porcelain production. Visabeira Turismo seeks, in the geographical context of Ria de Aveiro, Vista Alegre hotel, museum and Vista Alegre flagship shop, Vista Alegre outlet and Bordallo Pinheiro[4] to create a unique touristic cluster, delivering a different and integrated experience. Therefore, the creation effort of these synergies represents Visabeira Turismo big bet to develop not only the touristic offer of both the Hotel and the Museum and to leverage the touristic potential at a larger geographical scale.

Moreover, offering a myriad of services including wedding events, bike tours, gastronomical endeavors, pottery workshops, fitness center, VAIC can provide a distinctive touristic

[4] Bordallo Pinheiro is a 19th century Caldas da Rainha-based pottery and cutlery brand founded by Rafael Bordallo Pinheiro, a renowned Portuguese artist. It was acquired by Visabeira in 2008.

experience, especially for senior visitors (Appendix G). These typology and combination of touristic experiences highlights the idea that tourism destinations are shaped not only by providers but also by tourists themselves, who play an active role as they might be co-creators of experiences (Cutler & Carmichael, 2010), and, in this sense, influencing both the satisfaction and quality perception of their own experience.

From the tourism management perspective, one of the main goals is to maximize tourists total yield (both in average expenditure and in occupancy rates). Hence, the identification of seasonality patterns among markets and to attract compliant segments will enable them to accomplish that goal (O'Brien *et al.*, 1996). For this matter, VAIC due to its potential to smooth seasonality through the effective marketing of its offers (i.e. SPA, congress and meeting rooms) is, hence, able to maximize both expenditure and occupancy rates by attracting senior tourists. The VAIC ability to merge its cultural assets with contemporary experiences and the network functioning of its touristic resources, namely their built heritage and cultural assets allows visitors, especially seniors, to fulfill their motivations and aspirations related to Vista Alegre core concept.

## 3.2 METHODOLOGY

Concerning the methodological approaches, secondary and primary research tried to answer the main objective of this study. Exploration of secondary data included not only all bibliography materials used in the literature review on senior and quality and luxury tourism in order to support the empirical work but also statistical data regarding tourism in Aveiro region and VAIC. Primary research, the main tool of this study, includes quantitative research. An in-situ convenience survey by questionnaire was conducted. This study includes three types of research. Descriptive because it attempts to measure both the size and characteristics of senior visitors in Aveiro city center and VAIC. Exploratory because it aims to generate some insights and ideas regarding the importance of the senior segment to VAIC. Explanatory because there is a causal explanation for finding out associations and correlations between independent and dependent variables. The questionnaire aims to collect accurate information regarding the demographic, travel characteristics and profile of senior visitors of VAIC. This study operationalizes senior visitors as 55 years old and above. In terms of its composition and size, a convenience sample of 150 visitors at Aveiro city center and VAIC – includes visitors of the hotel, the museum or/ and the shop – was used. A questionnaire translated in two different languages – Portuguese and English –, with 28 closed-ended and open-ended questions was conducted to visitors from May to August 2017. Various scales were applied, namely binary, nominal and summated rating scales. Regarding the summated rating scales, the one used here was a 5-point rating Likert scale. Pre-testing procedures were essential for the success of the survey. Therefore, the questionnaire was tested for two days prior to the conduct of the main research at the same places and adjustments and corrections were introduced. A convenience sample, which is a particular type of non-random or non-probability sample was used. In the present case, this convenience sample consists of visitors that just happened to be where the information for this study was being collected – Aveiro city center and VAIC.

For the purposes of this study, associations between (1) Vista Alegre brand awareness and tourist age; (2) Vista Alegre brand awareness and country of residence; (3) Vista Alegre brand awareness and Aveiro visit; led to the formulation and testing of three hypotheses:

H1) Vista Alegre brand awareness is positively correlated to age increase of visitors;

H2) Vista Alegre brand awareness is positively correlated with Portugal (country of residence);

H3) Vista Alegre brand awareness is positively correlated with repeated visits to Aveiro.

## 3.3. Case-study Findings and Results Discussion

### Aveiro and VAIC Socio-demographic visitors profile

Age **The majority of the respondents had over 55 years of age (61,5%)**. The average age of the total sample was 54.60 (SD = 13.90), ranging between 15 and 80. Regarding senior visitors, and according to Bailey & Lubulwa (2003) age group segmentation – "senior-youngsters" (aged 55-64), “young sixties and 75-year-olds” and (aged 65-74)” and "old people" (over 75 years of age)- “senior-youngster” represented 24% of sample; “young sixties and 75-year olds” and “old people” represented 22% and 26%, respectively.

Gender The majority of the sample **was male** (64.6%) (women 35.4%).

Country of residence Most of respondents **lived in Portugal** (40.7%), followed by France (13.3%), Spain (12.0%), Brazil (6.7%) and United Kingdom (6.7%). The total sample of Portuguese tourists was 43%.

**Table 3.** Top five Respondents by Country of Residence

| | Frequency | Percent |
|---|---|---|
| Portugal | 61 | 40,7 |
| France | 20 | 13,3 |
| Spain | 18 | 12 |
| Brazil | 10 | 6,7 |
| United Kingdom | 10 | 6,7 |
| Germany | 6 | 4 |

**Source:** Author, based on own study of Aveiro and VAIC visitors

Level of Education and professional Situation **Foreign residents were more qualified.** 40% of foreigner residents finished higher education compared to 26.2% of Portuguese respondents. 49.4% of foreign respondents concluded secondary education compared to 38.5% of Portuguese. **There were slightly more retirees among foreigner (32.9%) than Portuguese residents (32%)**. Regarding current occupation, 40% of

Portuguese residents were employed, 32% retired, 23.1% self-employed, 3.1% students, and 1.5% homemaker or unemployed. Regarding foreigner residents (47.1% of the sample), 32.9% were retired, 16.5% self-employed, and 3,5%were students.

LEVEL OF INCOME Altogether, **48% of respondents reported an income between 21.000 and 50.000€/year**; 26% an income inferior to 21.000€/year; 23.3% an income between 51.000 and 100.000€; and 2.7% an income superior to 100.000€/ year.

## AVEIRO AND VAIC: COMPARING SENIORS (+55 ) WITH -55 SEGMENT

REASONS TO CHOOSE AVEIRO AS A TOURIST DESTINATION **"Leisure and recreation" (83%); "Historical heritage" (51%); and "Food and enotourism" (44%) were the main reasons to choose Aveiro a tourist destination**. 57.3% of respondents were in Aveiro for the first time. For seniors (+55 years), the most chosen sources of information to select Aveiro as a touristic destination where family and friends (37.3%) and travel agencies (15.3%); while Internet (48.3%) and travel agencies (17.2%) were prevalent for the -55 segment.

REASONS TO VISIT VAIC **"Rest and Relax" was the main reason for visiting VAIC** (3,77 in Likert scale) followed by "Travel with my family" (3,58) and "Travel with a nice group of people" (3,55). Sorting out by age, **"Cultural reasons" was the most chosen reason for seniors (3,85)** compared with "Rest and Relax" for the under 55 years old (4,07).

HOTEL VISITS **Senior and foreign tourists spent more nights at the hotel** in average than Portuguese tourists (2,16 vs 1,5 nights). Such tourist behavior is particularly significant among seniors (2,43 vs. 1,4 nights).

SHOPPING BEHAVIOR Despite a higher share of senior visitors bought something from the VAIC shops (64.4%) when comparing with the -55 segment (58.8%), they spent less, in average, (170,13€) than the younger segment (203,82€).

REPEATING VISITS **Senior tourists were less likely to repeat visit to VAIC.** 69.5% responded "yes" when questioned if they consider to visit VAIC again, while the response rate of those under 55 was 86.2%.

### HYPOTHESIS TESTING

H1) Vista Alegre brand awareness is positively correlated to age increase of visitors

Results suggested a positive significant association between Vista Alegre brand awareness and age ($\chi^2$ (2) = 11.56, $p$ = .003); whereby more seniors than expected knew Vista Alegre b brand. Also, respondents who knew Vista Alegre Brand were, on average, older than respondents who did not know the brand ($t_{148}$= -2.832, p = .005; M = 56.35, SD = 12.88 vs. M = 49.71, SD = 14.56)[5].

H2) Vista Alegre brand awareness is positively correlated with Portugal (country of residence)

The study found a positive and very significant association between knowing the Vista Alegre brand and country of residence ($\chi^2$ (1) = 50.53, p < .001). Whereby more Portuguese tourists than expected knew Vista Alegre Brand, while less foreign tourists than expected did not know the brand. In fact, only 0,006% of Portuguese resident tourists did not know Vista Alegre brand when compared to a 32% share among foreign tourists.

H3) Vista Alegre brand awareness is positively correlated with repeated visits to Aveiro

The study also found a positive and significant association between knowing Vista Alegre brand and whether this was the first visit to Aveiro ($\chi$2 (1) = 25.60, p < .001). Results indicated that 42% tourists that knew Vista Alegre brand were repeating the visit to Aveiro while only 25.3% who knew the brand were visiting Aveiro for the first time.

[5] Results obtained from a Pearson's Chi-squared test and independents' sample (Student's t test).

From the hypothesis formulated above, all have been accepted. Stronger associations were found in the binomial brand awareness/age (H1) and brand awareness/Portugal as country of residence (H2).

## 4. CONCLUSIONS, RECOMMENDATIONS AND LIMITATIONS

According to data provided by the VAIC board (Appendix C), both total overnight stays and VAIC visits, namely to the museum, have been increasing steadily in 2017 (data from the 1st semester), with an average increase of 5% per month and showing a peak from May to September, highly depending on school tours and daily excursions. Nevertheless, the idea that the senior segment has not been sufficiently explored by VAIC administration stands out as one of the most important conclusions of this study. This is clear, for example, by the fact that if, in general, senior visitors uphold a greater willingness and availability to travel (resulting from the lack of time and family constraints and higher incomes) and that they generate longer stays and thus have the potential to smooth seasonality, such patterns are not mirrored in the VAIC study. Among the most relevant findings concerning the senior market, and if it is true that it generates longer stays at the hotel, the study found that, despite holding a higher level of income when compared to younger segments (Appendix H), they provided a lower volume expenditure in Vista Alegre shops. This might derive from the fact that VAIC offering is either insufficient or inadequate to senior visitors. In this context, Vista Alegre Montebelo board shall design senior-directed offering of products, services and experiences to fulfill such visitors' motivations and aspirations, taking advantage of the potential Vista Alegre represents for this segment as the brand holds greater awareness among seniors (74.7% of seniors knew Vista Alegre compared to 55.9% among younger than 55). Considering those aspects, it is recommended that VAIC should deliver **improved accessibility facilities**, **senior and family-targeted events and activities.** To effort on the inter-generational family market – grandparents/grandchildren would leverage both the duration of stays at the hotel and VAIC complementary products and services demand. Also, to build partnerships with other institutions present in Aveiro landscape such as Santa Casa da Misericordia, local clinics and hospitals, and INATEL would stem seniors' intention to visit the VAIC. Besides, it is also be suggested to develop local ateliers with local retired artisans to developed handcraft workshops based on the cultural heritage of the region and not only Vista Alegre itself.

According to survey, 44.4% of seniors interviewed rated the quality of cultural tours as of "low" or "not low nor high" and 40.7% was not aware of the any cultural tours at all. Henceforth, VAIC board might allure seniors that stay at the hotel to integrated purchases not only on Vista Alegre and Bordallo Pinheiro shops but also by joining in on touristic tours provided by Vista Alegre or agent partners. Concerning accessibility and mobility, another recommendation is to lobby both public and private agents such as Aveiro city hall and touristic operators to provide a **shuttle service from the train station and Aveiro city center.** Touristic operators provide mostly local boats – Moliceiros – and touristic trains in Aveiro city center, disregarding VAIC; in fact, the majority of senior visitors travelled by own or shared car (66.1%) while only 18.6% participated in an organized tour bus to get to VAIC. Another point that stands out from the study is the fact that the referral of either friends or family is key for attracting new visitors (96.6% of +55 segment would recommend Vista Alegre to a friend) leading to lower promotion costs. Moreover, further than focusing on promoting senior and family events and fomenting accessibility, VAIC must rely on an integrated management that **reinforces the role as museum as Vista Alegre brand showroom** with promotion located around the remaining 29 shops located in Portugal and linked with brand promotion itself. Finally, e**xplore the synergies between VAIC shops,**

**chapel, museum and hotel**, by complementing the museum and chapel voucher with the SPA services (the SPA service is misused and only 22% of the total hotel guests use the museum voucher and visit the shops[6]).

When developing this work project, several limitations that impacted both the deepness of my research and the quality of recommendations provided in this paper were found. First, research literature limitations in terms of a more detailed characterization of senior tourism segment behavior, motivation and consumer patterns and reference to other empirical studies that would allow further comparative analysis.

Second, for the empirical part, the lack of market research on the senior segment tourism by both Vista Alegre brand and the Visabeira group created some setbacks when addressing the research questions. Such difficulties arose mainly from the lack of internal data, namely in terms of museum visitors and hotel guests age, that would allow providing recommendations with greater empirical support. Third, in terms of research design, one limitation is linked with the survey questionnaire: one open question about activities and events that senior visitors would enjoy having offered by the VAIC could provide a need-oriented analysis and thus more adequate recommendations for that segment.

Lastly, several other hypothesis would worth to be tested: correlations between Vista Alegre brand awareness and several sociodemographic characteristics, namely level of education and level of income; Vista Alegre awareness and reasons to visits Aveiro, namely cultural motivations; and, Vista Alegre brand awareness and intention to purchase Vista Alegre products and services at VAIC. These limitations can constitute lines for future research.

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## LIST OF ABBREVIATIONS

| | |
|---|---|
| **AIDA** | Associação empresarial do Distrito de Aveiro |
| **CCDR** | Comissão de Coordenação e Desenvolvimento Regional do Centro |
| **DGOTDU** | Direção Geral Ordenamento do Território e Desenvolvimento Urbano |
| **GDP** | Gross Domestic Product |
| **GNI** | Gross National Income |
| **INE** | Instituto Nacional de Estatística (Portugal) |
| **INATEL** | Instituto Nacional para o Aproveitamento dos Tempos Livres |
| **ISCIA** | Instituto Superior de Ciências da Informação e Administração |
| **NUTS** | Nomenclature of Territorial Units for Statistics |
| **TSA** | Transportation Security Administration (USA) |
| **UN** | United Nations |
| **UNWTO** | United Nations World Tourism Organization |
| **VAIC** | Vista Alegre Ílhavo Complex |
| **WTO** | World Trade Organization |
| **WTTC** | World Travel & Tourism Council |

# APPENDIX A
## Glossary[7]

**Country of residence** The country of residence of a household is determined according to the center of predominant economic interest of its members. If a person resides (or intends to reside) for more than one year in a given country and has there his/her center of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country

**Establishment** An establishment is an enterprise, or part of an enterprise, that is situated in a single location and in which only a single productive activity is carried out or in which the principal productive activity accounts for most of the value added

**Inbound tourism** Comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip

**Tourist (or overnight visitor)** A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay

**Trip** A trip refers to the travel by a person from the time of departure from his/her usual residence until he/she returns: it thus refers to a round trip. Trips taken by visitors are tourism trips.

**Visitor** A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.

**Outbound tourism** Comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of domestic tourism trip

**Travel/tourism** Travel refers to the activity of travellers. A traveller is someone who moves between different geographic locations, for any purpose and any duration. The visitor is a particular type of traveller and consequently tourism is a subset of travel.

**Tourism sector** The tourism sector, as contemplated in the TSA, is the cluster of production units in different industries that provide consumption goods and services demanded by visitors. Such industries are called tourism industries because visitor acquisition represents such a significant share of their supply that, in the absence of visitors, their production of these would cease to exist in meaningful quantity.

**Tourism industries** Tourism industries (also referred to as tourism activities) are the activities that typically produce tourism characteristic products. Tourism characteristic products are those that satisfy one or both of the following criteria: (a) Tourism expenditure on the product (either good or service) should represent a significant share of total tourism expenditure (share-of-expenditure/demand condition); (b) Tourism expenditure on the product should represent a significant share of the supply of the product in the economy (share-of-supply condition). This criterion implies that the supply of a tourism characteristic product would cease to exist in meaningful quantity in the absence of visitors.

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# APPENDIX B
## VISABEIRA TURISMO GROUP OVERVIEW

### GRUPO VISABEIRA TURISMO

Visabeira group is a multinational private industry conglomerate that started out in Viseu, Portugal as a telecom and tech engineering company back in 1980 following a deep privatization program by the Portuguese government (Baklanoff, 1996). Thereafter, the holding have shifted business to a myriad of sectors, including traveling and tourism, energy, real estate and silverware. The managerial board comprises an eighth-people administration composed by the chairman and CEO, Fernando Campos Nunes, two vice-presidents and four administrators. Each accountable for different sectors: Visabeira global, Visabeira Industria, Visabeira Turismo, Visabeira imobiliária and Visabeira participações. Despite that, tourism is not the core business of the company, representing nearly 6% of the group, is the one that is increasing at a higher rate and steady pace, EBIDTA growth near 4% yearly growth since 2011 (from 12,266,181 in 2011 to 17,266,181 in 2016). In 2016, the tourism business of Visabeira had had a turnover of 33.4m€ (6% of holding total)[1]. With a strong presence in 15 countries including Spain, France, USA, Brazil and India, and over 9.700 employees in 2016,. The tourism venture has its inception in 1988 when the then SME inaugurated Montebelo hotel in Viseu, that originated the brand of hotel chains that currently owns 12 hotels, split between Portugal and Mozambique. Integrated in the Visabeira group (100% of capital), the Visabeira Turismo group currently owns six hotels in Portugal, through the Montebelo brand (owning of 99.83% of capital1) in Viseu, Agueira and Ílhavo. In the latter, in partnership with the brand Vista Alegre, it was aimed to enhance the porcelain heritage in Portugal and its social, artistic and cultural relevance and the ceramic industry, in general, constituting itself as one of the main five star hotels in the region

**Source:** Visabeira Anual Report 2016

### THE COMPLEX- PHOTO GALLERY

**FIGURE2.** 17th Century Vista Alegre Penha de França Chapel

**FIGURE1.** Vista Alegre Flagship Shop

**FIGURE3.** Montebelo Vista Alegre Ílhavo Hotel

# APPENDIX C
# INDICATORS OF TOURISM CHARACTERIZATION OF AVEIRO REGION AND MUNICIPALITY (2013-2017)

**Concelho:** Aveiro
**Distrito:** Aveiro
**CIM:** Região de Aveiro
**Delegação** Ria de Aveiro

Turismo Centro Portugal
Um país dentro do País

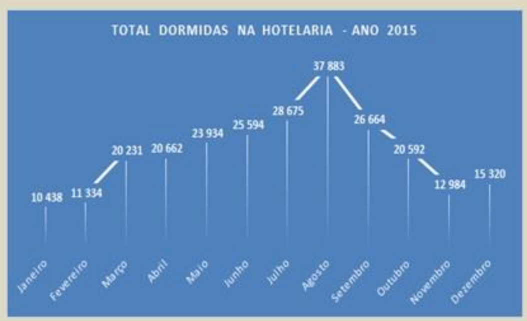
Superfície Territorial: 197,58 Km2
Densidade populacional (Km2) 390,9 hab./km2
Nº de habitantes: 77.229

**Empreendimentos Turísticos**

Total Empreendimentos: 13 Total Camas: 1.329

| Tipo | Classificação | Nº Estab. | Nº Camas |
|---|---|---|---|
| H | 5 ★ | 0 | 0 |
| | 4 ★ | 4 | 584 |
| | 3 ★ | 6 | 615 |
| | 2 ★ | 2 | 70 |
| | 1 ★ | 0 | 0 |
| HR | 5 ★ | 0 | 0 |
| | 4 ★ | 0 | 0 |
| | 3 ★ | 0 | 0 |
| ALD | 5 ★ | 0 | 0 |
| | 4 ★ | 0 | 0 |
| | 3 ★ | 0 | 0 |
| AT | 5 ★ | 0 | 0 |
| | 4 ★ | 0 | 0 |
| | 3 ★ | 0 | 0 |
| | Pousadas | 0 | 0 |
| Unidades em reconversão | | 1 | 60 |
| TH | Turismo de Habitação | 0 | 0 |
| AG | Agro-Turismo | 0 | 0 |
| CC | Casas de Campo | 0 | 0 |
| TA | Turismo de Aldeia | 0 | 0 |
| | Hostels | 8 | 236 |
| AL | Alojamento Local | 217 | 1.354 |
| PC | Parque de Campismo | 2 | 1.723 |
| PC | Parque de Campismo Rural | 0 | 0 |

| Total Dormidas em Alojamento Turístico | | Var% |
|---|---|---|
| Ano 2013 | 206.901 | |
| Ano 2014 | 226.933 | 9,68 ↑ |
| Ano 2015 | 278.438 | 22,70 ↑ |


O período junho-setembro, representa 46,72 % do total dormidas.

| Principais Mercados TOP 5 em Alojamento Turístico | Ano 2015 | Var % 15/14 |
|---|---|---|
| 1. Portugal | 124.782 | 32,74 ↑ |
| 2. Espanha | 71.113 | 8,30 ↑ |
| 3. França | 16.542 | 24,74 ↑ |
| 4. Alemanha | 10.854 | 27,36 ↑ |
| 5. Reino Unido | 5.033 | 29,15 ↑ |

Fonte: INE, dados 2016 são ainda provisórios

| | |
|---|---|
| Empresas de Animação | 56 |
| Nº Agências de Viagens | 22 |
| Nº Rent-a-Car | 22 |

| Posto Informação Turística | 2016 | Var% 16/15 |
|---|---|---|
| Total Estrangeiros: | 113.271 | 23,21 ↑ |
| Total Nacional: | 8.581 | 13,07 ↑ |

| Taxas Ocupação Período | % Resp. U Hot. | % Camas U Hot. | Dormidas |
|---|---|---|---|
| Amostra Verão 15/16 | 53,87 (7) | 57,34 | ▼ -0,6 |

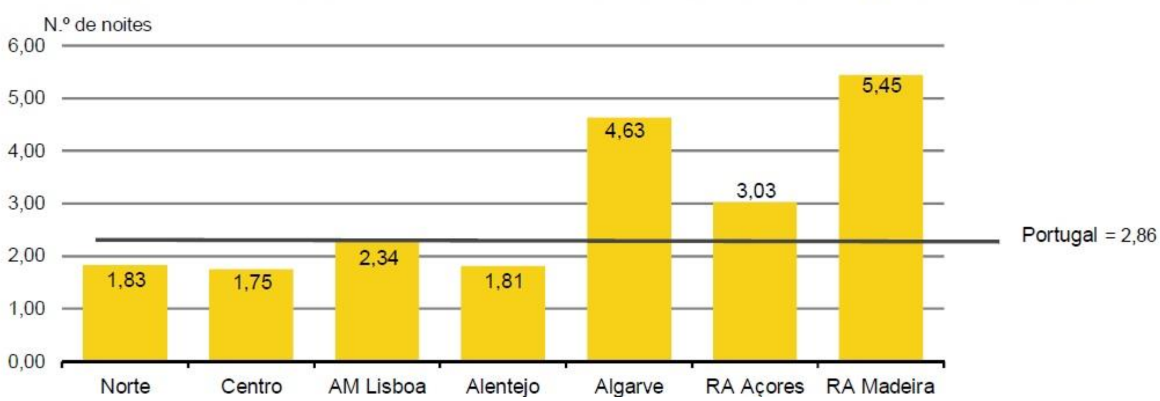
www.turismodocentro.pt
geral@turismodocentro.pt
www.facebook.com/turismodocentro
www.investenocentro.blogspot.pt

Última atualização: 11/07/2017

| Indicadores Atendimento Aveiro 2016 - TOP 15 | | | | | | | | | | | | | | Var. % 2015/2016 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| PAÍSES | JAN | FEV | MAR | ABR | MAI | JUN | JUL | AGO | SET | OUT | NOV | DEZ | Total Geral | |
| Espanha | 590 | 878 | 7640 | 2314 | 3276 | 3165 | 7912 | 16828 | 6359 | 4865 | 1526 | 3327 | 58680 | 21,26 |
| França | 185 | 318 | 599 | 1766 | 2632 | 2256 | 3606 | 5575 | 4220 | 2127 | 497 | 265 | 24046 | 27,88 |
| **Nacional** | 139 | 311 | 624 | 708 | 508 | 686 | 692 | 1905 | 1446 | 733 | 336 | 493 | 8581 | 13,07 |
| Alemanha | 35 | 90 | 238 | 367 | 671 | 542 | 417 | 562 | 971 | 688 | 224 | 76 | 4881 | 23,63 |
| Brasil | 198 | 219 | 207 | 342 | 431 | 445 | 423 | 451 | 639 | 817 | 249 | 270 | 4691 | 47,93 |
| Holanda | 16 | 27 | 51 | 266 | 354 | 444 | 267 | 322 | 455 | 359 | 117 | 81 | 2759 | 7,65 |
| Itália | 25 | 32 | 100 | 126 | 118 | 257 | 271 | 624 | 273 | 206 | 70 | 42 | 2144 | 0,19 |
| Bélgica | 4 | 41 | 42 | 145 | 160 | 239 | 527 | 235 | 356 | 66 | 126 | 14 | 1955 | 7,71 |
| Reino Unido | 24 | 47 | 126 | 173 | 170 | 254 | 207 | 211 | 288 | 320 | 76 | 46 | 1942 | 0,99 |
| Israel | 2 | 2 | 22 | 87 | 115 | 132 | 241 | 92 | 378 | 392 | 52 | 2 | 1517 | 16,78 |
| E.U.A. | 9 | 33 | 49 | 106 | 161 | 125 | 158 | 282 | 254 | 260 | 34 | 39 | 1510 | 53,14 |
| Canadá | 4 | 10 | 36 | 80 | 100 | 131 | 95 | 120 | 262 | 194 | 33 | 8 | 1073 | 20,16 |
| Polónia | 18 | 24 | 54 | 34 | 57 | 142 | 101 | 133 | 261 | 112 | 50 | 14 | 1000 | 17,23 |
| Japão | 31 | 54 | 46 | 112 | 137 | 59 | 54 | 84 | 102 | 51 | 98 | 99 | 927 | 75,9 |
| Argentina | 27 | 19 | 22 | 41 | 172 | 75 | 78 | 54 | 105 | 46 | 25 | 21 | 685 | 110,77 |
| Outros Países | 84 | 121 | 328 | 347 | 683 | 696 | 722 | 758 | 755 | 636 | 215 | 116 | 5461 | 27,12 |
| **Total Estrangeiros** | 1252 | 1915 | 9560 | 6306 | 9237 | 8962 | 15079 | 26331 | 15678 | 11139 | 3392 | 4420 | 113271 | 23,21 |
| **Total Global** | 1391 | 2226 | 10184 | 7014 | 9745 | 9648 | 15771 | 28236 | 17124 | 11872 | 3728 | 4913 | 121852 | 22,44 |

**Source:** Data collected and provided by Aveiro Touristic Point
*https://www.visitportugal.com/pt-pt/content/posto-de-turismo-aveiro*

**Figura 4.2.4 - Estada média nos estabelecimentos hoteleiros, por NUTS II, 2016**




**Source:** Estatísticas do Turismo 2016, INE, 2017

# Análise regional

## Top 5 dos Grupos hoteleiros/ Entidades de *management* por NUTS II

### Norte

| Accor Hotels[1] | Axis Hotéis e Golfe | HF Hotéis Fénix | Hoti Hotéis/ Meliá Hotels & Resorts | Inter Continental Hotels Group - IHG[1] | Outros | Total |
|---|---|---|---|---|---|---|
| (1.204) 6% | (816) 4% | (776) 4% | (655) 3% | (649) 3% | (16.892) 80% | (20.992) |

### Centro

| Grupo de Desenvolvimento das Termas de Portugal[1] | Hoti Hotéis/ Meliá Hotels & Resorts | Montebelo Hotels & Resorts | Natura IMB Hotéis | Inatel Turismo[1] | Outros | Total |
|---|---|---|---|---|---|---|
| (658) 3% | (623) 3% | (511) 3% | (467) 2% | (390) 2% | (17.658) 87% | (20.307) |

### Lisboa

| SANA Hotels | VIP Hotels | Accor Hotels | Marriott Hotels & Resorts[1] | Continental | Outros | Total |
|---|---|---|---|---|---|---|
| (1.901) 7% | (1.837) 6% | (1.673) 6% | (1.404) 5% | (968) 3% | (21.449) 73% | (29.232) |

### Alentejo

| Sonae Capital[2] | Pestana Hotels & Resorts / Pousadas de Portugal | Vila Galé Hotéis | Blue & Green | M'ar de Ar Hotels | Outros | Total |
|---|---|---|---|---|---|---|
| (641) 10% | (454) 7% | (266) 4% | (205) 3% | (155) 3% | (4.581) 73% | (6.302) |

### Algarve

| Vila Galé Hotéis | Pestana Hotels & Resorts / Pousadas de Portugal | Tivoli Hotels & Resorts[1] | NAU Hotels & Resorts | MGM Muthu Hotels[1] | Outros | Total |
|---|---|---|---|---|---|---|
| (2.140) 5% | (2.066) 5% | (1.650) 4% | (1.309) 3% | (1.080) 2% | (35.787) 81% | (44.032) |

### R. A. Açores

| Bensaude Turismo[1] | Azoris Hotels & Leisure | Grupo Ciprotur | VIP Hotels | Açorsonho Hotéis[1] | Outros | Total |
|---|---|---|---|---|---|---|
| (815) 18% | (446) 10% | (274) 6% | (229) 5% | (225) 5% | (2.624) 56% | (4.613) |

### R. A. Madeira

| Pestana Hotels & Resorts / Pousadas de Portugal | Porto Bay Hotels & Resorts | Four Views Hotels | Savoy Hotels & Resorts | Enotel Hotels & Resorts | Outros | Total |
|---|---|---|---|---|---|---|
| (2.977) 21% | (812) 6% | (747) 5% | (692) 5% | (601) 4% | (8.432) 59% | (14.261) |

[1] A análise efetuada foi baseada em informação pública disponível.
[2] A designação do Grupo Sonae Turismo foi alterada para Sonae Capital.



Home
Sobre
Contactos

**Source:** Atlas da Hotelaria, Deloitte, 2017

## APPENDIX D
## MAP OF CENTRO AND AVEIRO REGION


**Source:** Turismo do Centro website
*http://turismodocentro.pt/*

## APPENDIX E
## VAIC DATA

Museum Visitors (1st semester 2017)

| Visitantes | Janeiro | Fevereiro | Março | Abril | Maio | Junho | TOTAIS |
|---|---|---|---|---|---|---|---|
| Entradas Individuais | 940 | 754 | 743 | 1.689 | 1.282 | 1.517 | 6.925 |
| Entradas Livres | 206 | 227 | 144 | 229 | 600 | 311 | 1.717 |
| Bilhete Integrado MVA - MMI | 24 | 134 | 106 | 85 | 66 | 73 | 488 |
| Montebelo Vista Alegre | 339 | 412 | 423 | 779 | 659 | 760 | 3.372 |
| Parceiros - CMI | 19 | 24 | 21 | 74 | 0 | 2 | 140 |
| Entradas Grupos Instituições Div. | 169 | 92 | 431 | 944 | 1.798 | 1.069 | 4.503 |
| Entradas Grupos Escolares | 260 | 269 | 1.243 | 864 | 707 | 320 | 3.663 |
| Entradas Grupos Operadores Turísticos | 0 | 0 | 15 | 0 | 57 | 61 | 133 |
| Serviços Educativos - Programas | 2 | 20 | 9 | 185 | 280 | 570 | 1.066 |
| Programação Cultural | 0 | 0 | 0 | 13 | 283 | 129 | 425 |
| TOTAIS | **1.959** | **1.932** | **3.135** | **4.862** | **5.732** | **4.812** | **22.432** |

**Source:** Data collected and provided by VAIC board

### Vista Alegre Musuem

Comprising permanent and temporary exhibits of both tangible and intangible brand assets, it is the Vista Alegre showroom and the primacy of experience is well pronounced. Divided in 4 rooms that ranges from pottery to paintings, documents, imagery and cutlery as well workshops, the Vista Alegre museum is a mix of modernity and ancestry to give the visitor a sense of communion between the old, traditional and vintage Vista Alegre imagery with a modern, cosmopolitan sense.

**Source:** Vista Alegre Website
*www.vistaalegre.com*

## APPENDIX F.SURVEY FORM

# Survey

**"How to raise attractiveness of Vista Alegre (hotel + museum) for older segment (+55)"**

Dear Sir or Madam, this questionnaire emerges within the scope of a Master's thesis and aims to understand and analyze the structure of the senior consumers (+55) of the Vista Alegre premises (Hotel, Museum and stores). Therefore, through the results, the understanding of consumption motivations of this segment, as well as its needs constitute the main goal of this research. All collected data provided in this survey are anonymous and confidential and will be dealt solely and exclusively within the purpose of this study. It takes 5 minutes maximum.

**Thank you in advance for your response to this questionnaire.**

Tiago Miguel Boto | Email.: tiagomboto@gmail.com | Phone.: (+351) 910941940

**Please, fill with a (X) in the blank spaces.**

**Socio-demographic questions**

**1. Age:** ____years

**2. Sex:** Male ☐ Female ☐

**3. Marital Status:** Single ☐ Married ☐ Divorced ☐ ☐ Widower ☐ Union

**4. Nationality:** ________________________________________

**5. Residence - Country:** _________________________________

5.1 If you live in Portugal, please specify the municipality:__________________

**6. Do you live in more than one country?** Yes ☐ No ☐

6.1 If so, please specify the countries:: 1st country:_________________ 2nd country:____________________

**7. Level of education:**

Primary or middle school (1-9 years of school ☐) Secondary school (9-12 years ☐) College/University ☐ Education

**8. Current Occupation/Job**

Homemaker ☐ Student ☐ Unemployed ☐ Retired ☐ Employed ☐ Self-employed ☐ Employed ☐ Other: Which?___________________

**9. Net annual Income (€)::**

Up to 20, 000€/year ☐ 21,000 a 50,000€/year ☐ 51,000 a 100,000€/year ☐ > ☐ 100,000€/year

**Visit Characterization**

(If foreigner) Is this is your first visit to Portugal? ☐ Yes ☐ No

Is this is your first visit to the Aveiro Region? ☐ Yes ☐ No

**Please mention 3 (three) reasons why you have chosen the Aveiron region as tourist destination:**

1. Natural Heritage ☐
2. Historical heritage ☐
3. Business/Work/Study ☐
4. Food/Enoturism ☐
5. Leisure/Recreation ☐
6. Shopping ☐
7. Healthcare/Fitness ☐
8. Cultural Activities ☐
9. Sports Activities ☐
10. Family and/or Friends Visit ☐
☐
12. Acessibility/Proximity to major touristic destinations ☐
13. Deslocation to secondary residence
14. Other. ☐ Please Specify?________________________________________

**The "Vista Alegre" brand**

**1. Do you know Vista Alegre brand?** ☐ Yes ☐ No

If so, what do you relate the Vista Alegre the Vista Alegre brand to?

1. Tourism ☐ 2. Museology ☐ 3. Porcelain/Ceramics ☐ 4. Other ☐

Indicate **3 words** that, in your opinion, describe the brand Vista Alegre:____________________ ____________________ ____________________

**2. Is this is your first visit to Vista Alegre?** ☐ Yes ☐ No

**How did you know about the Vista Alegre touristic offer?**

1. Internet ☐
2. Travel agency ☐
3. Package tour ☐
4. Touristic advertisement ☐
5. Touristic information agencies (Portugal) ☐
6. Friends/Family advice ☐
7. Other. Please Specify?____________________________

*Continue on the next page…*

**3. How do you rate the services of each unit (Vista Alegre Hotel/Museum/Shops). Consider a scale from 1 (lowest) to 5 (highest):**

| | **1** | **2** | **3** | **4** | **5** |
|---|---|---|---|---|---|
| Visited Vista Alegre to rest and relax | ☐ | ☐ | ☐ | ☐ | ☐ |
| Visited vista Alegre to travel with my family | ☐ | ☐ | ☐ | ☐ | ☐ |
| Visited Vista Alegre to travel with a nice group of people | ☐ | ☐ | ☐ | ☐ | ☐ |
| | ☐ | ☐ | ☐ | ☐ | ☐ |
| Visited Vista Alegre for cultural reasons | ☐ | ☐ | ☐ | ☐ | ☐ |
| Visited Vista Alegre due to brand recognition | ☐ | ☐ | ☐ | ☐ | ☐ |
| Visited Vista Alegre for shopping | ☐ | ☐ | | ☐ | ☐ |
| Visited Vista Alegre to stay at the hotel | | | ☐ | | |

**4. Have you visited the museum?** Yes ☐ No ☐

**5. Have you visited the *Nossa Sª Penha de França* chapel?** ☐ Yes ☐ No

**6. Have bought anything from the Vista Alegre stores?** ☐ Yes ☐ No If YES, how much have you spend (€)?___________

**7. Have you slept at Montebelo Hotel?** ☐ Yes ☐ No If YES, how many nights? _________________

**8. How would you rate your visit qualitatively?**

| | Very Low | Low | Not Low nor High | High | Very High | NR/DK |
|---|---|---|---|---|---|---|
| 1. Museum | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 2. Chapel | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 3. Shops | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 4. Hotel | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

**9. How do you rate the quality / price relation of your visits?**

| | Very Bad | Bad | Not Bad nor Good | Good | Very Good | NR/DK |
|---|---|---|---|---|---|---|
| 1. Museum | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 2. Chapel | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 3. Shops | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 4. Hotel | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

**10. How would you rate the following facilities of the "Montebelo Vista Alegre Ílhavo Hotel"?**

| | Very Low | Low | Nor Low nor High | High | Very High | NR/DK |
|---|---|---|---|---|---|---|
| 1. Restaurant | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 2. Golf | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 3. Hotel Health Center | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 4. Cultural tours | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 5. Montebelo Card | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| 6. Global Rating | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |

**11. What other services would you like Vista Alegre to provide you with?** Please Specify:

________________________________________

**12. Would you like a hand-made personalized Vista Alegre/Atlantis certificate with your name?** ☐ Yes ☐ No

12.1. How much would you be able to pay for the certificate? _______ €

**13. Are you thinking to come back to Vista Alegre?** Yes ☐ No ☐

If YES , 1. To the Hotel only ☐ 2. To the Museum/Industrial Unit only ☐ 3. To the Chapel only ☐ 4. To the shops only ☐ 5. All of the above ☐

**14. Would you recommend a Vista Alegre visit to a friend?** ☐ Yes ☐ No Why?

______________________________

**15. Group composition of your visit:** ☐ Alone Acco☐panied Number of members: ___________________

If ACCOMPANIED, Indicate the composition of the tourist group:

1. Couple☐ ☐. Friends 3☐elatives 4. Org☐zed Trip ☐ 5. Other Please Specify: _____________________________

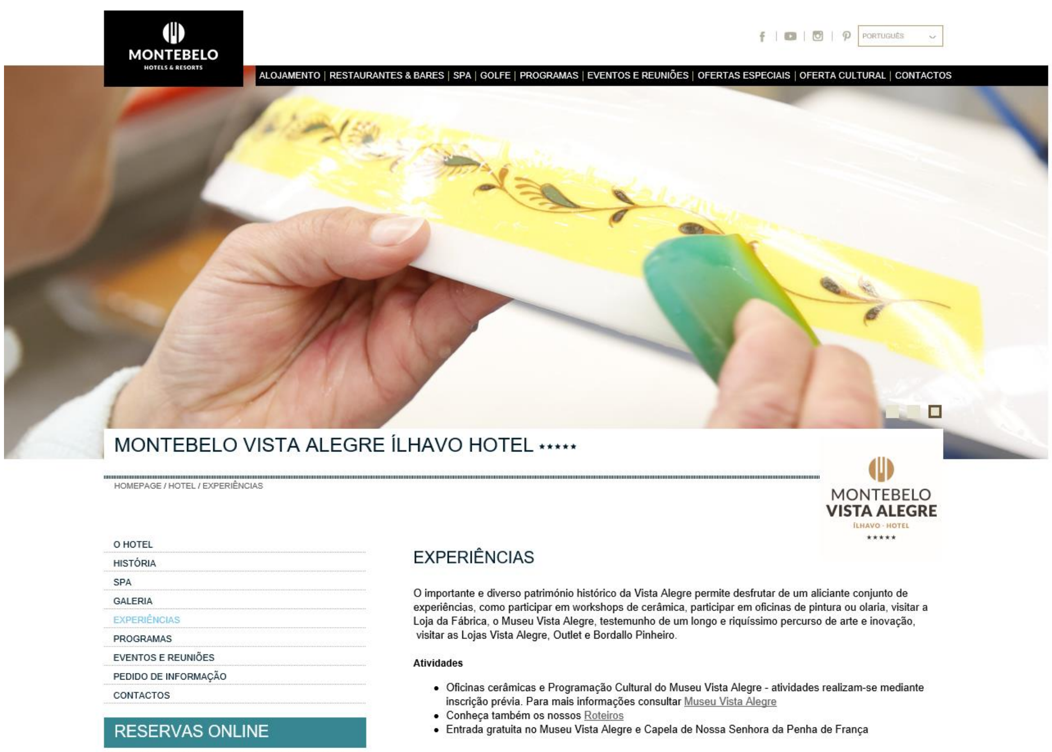
**16. What means of transportation have you used to get to Vista Alegre premises?**

1. Car☐ 2. Bus/Shutt☐ ☐ 3. Táxi ☐ 4. Other.

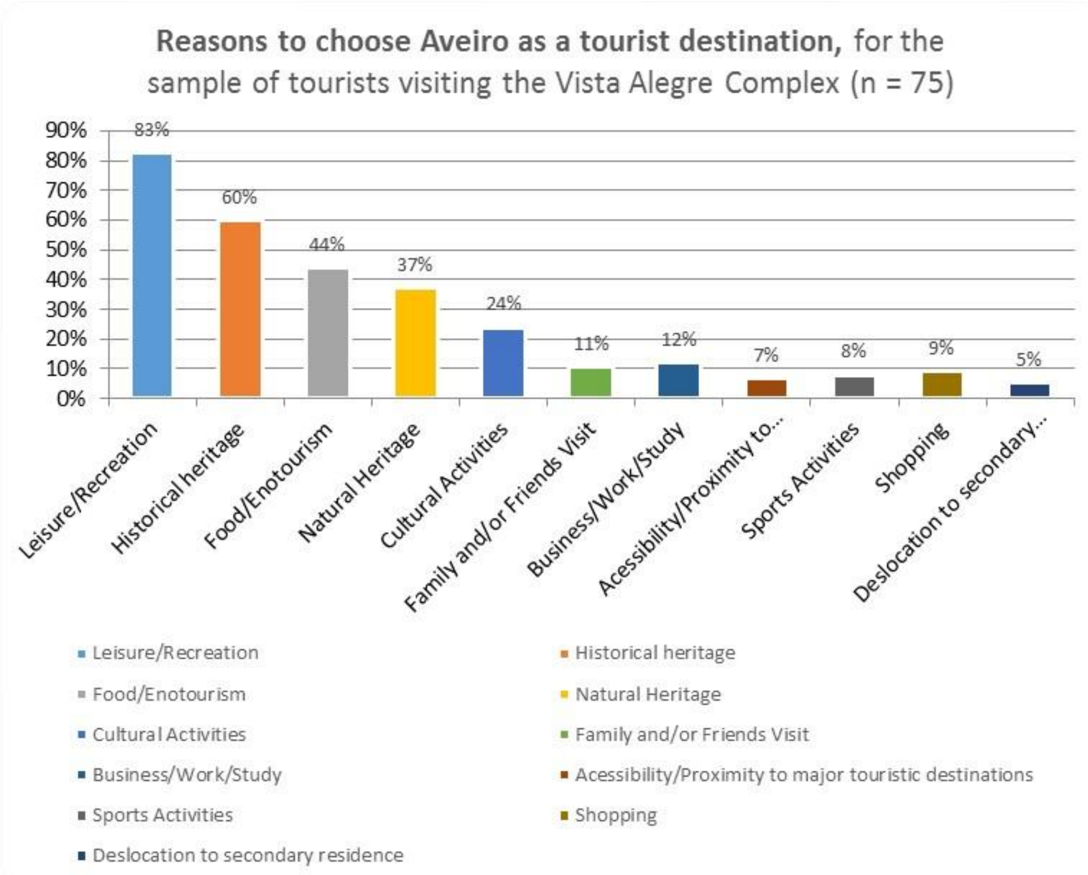
Please Specify: ____________________________

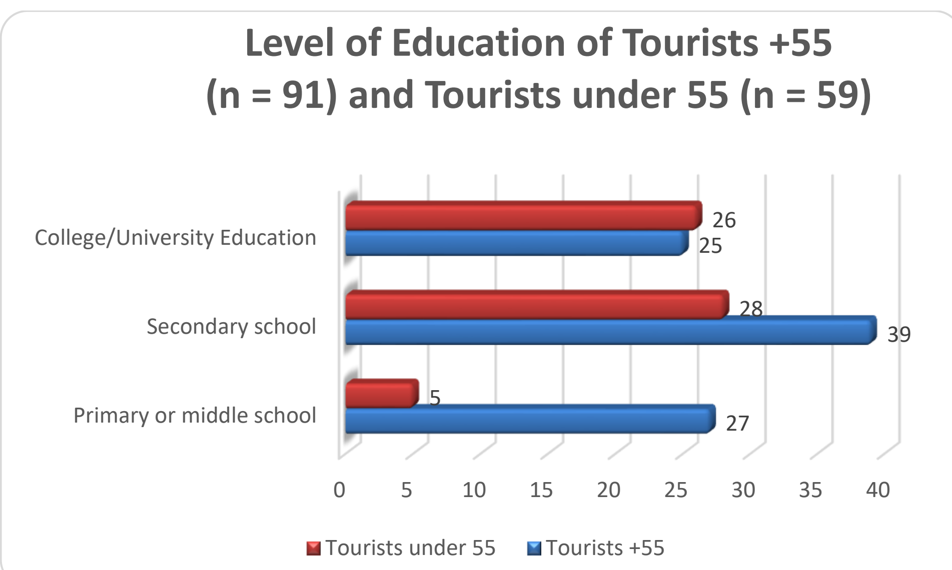
***<u>The End. Thank you very much</u>***

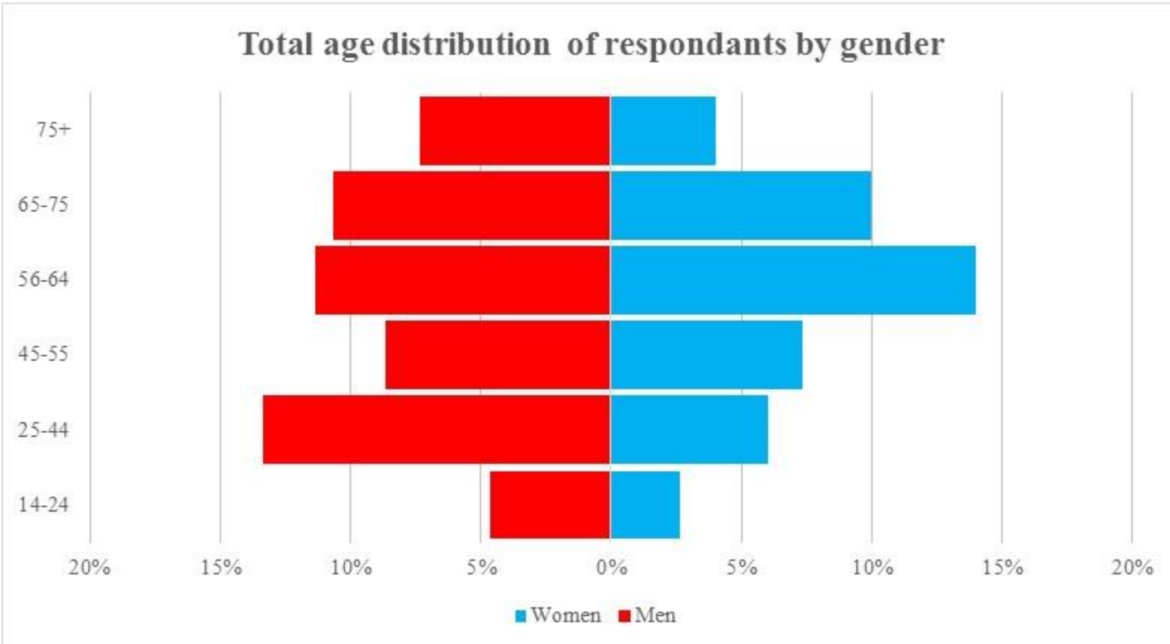
## APPENDIX G MONTEBELO VISTA ALEGRE WEBSITE LAYOUT

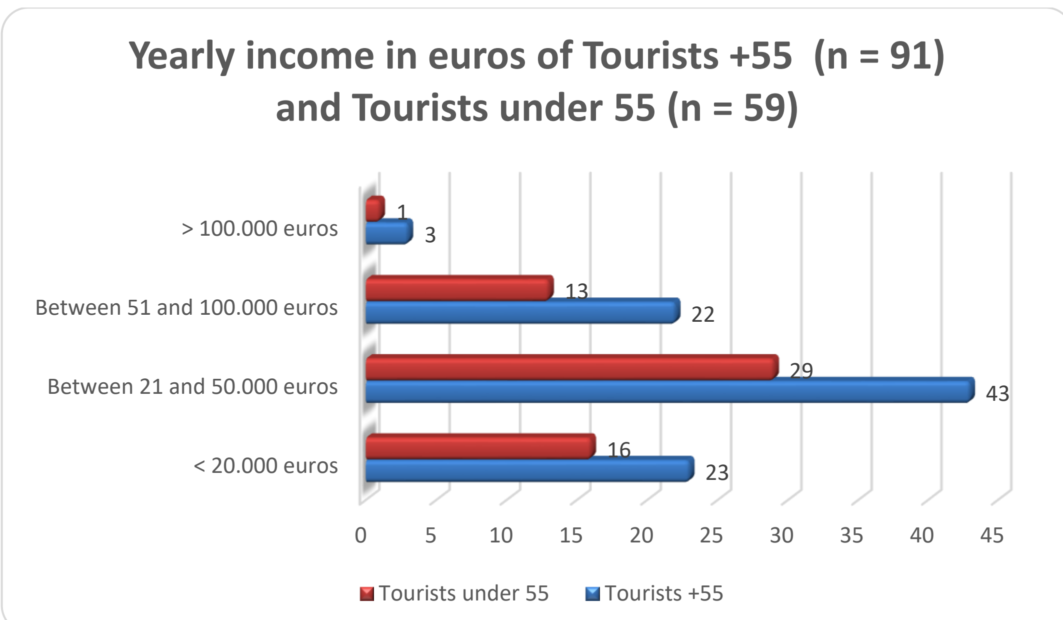


APPENDIX H
SURVEY DATA






**Source:** Author, based on own study of Aveiro and Vista Alegre Complex visitors